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APPLICATION NO.	FILING DATE	FIRST NAMED INVENTOR	ATTORNEY DOCKET NO.	CONFIRMATION NO.
10/553,186	07/18/2006	Shuichiro Nishino	107348-00526	2222

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EXAMINER

LOFTIS, JOHNNA RONEE

ART UNIT	PAPER NUMBER
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3624

NOTIFICATION DATE	DELIVERY MODE
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04/03/2009

ELECTRONIC

Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Notice of the Office communication was sent electronically on above-indicated "Notification Date" to the following e-mail address(es):

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Office Action Summary	Application No. 10/553,186	Applicant(s) NISHINO, SHUICHIRO	
	Examiner JOHNNA R. LOFTIS	Art Unit 3624	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

- 1) ☒ Responsive to communication(s) filed on 13 October 2005.
- 2a) ☐ This action is **FINAL**. 2b) ☒ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

- 4) ☒ Claim(s) 1-4 is/are pending in the application.
- 4a) Of the above claim(s) _____ is/are withdrawn from consideration.
- 5) ☐ Claim(s) _____ is/are allowed.
- 6) ☒ Claim(s) 1-4 is/are rejected.
- 7) ☐ Claim(s) _____ is/are objected to.
- 8) ☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☒ The drawing(s) filed on 13 October 2005 is/are: a) ☒ accepted or b) ☐ objected to by the Examiner.
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some * c) ☐ None of:
1. ☐ Certified copies of the priority documents have been received.
 2. ☐ Certified copies of the priority documents have been received in Application No. _____.
 3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

* See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

- | | |
|--|---|
| 1) <input checked="" type="checkbox"/> Notice of References Cited (PTO-892) | 4) <input type="checkbox"/> Interview Summary (PTO-413) |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948) | Paper No(s)/Mail Date. _____ |
| 3) <input checked="" type="checkbox"/> Information Disclosure Statement(s) (PTO/SB/08) | 5) <input type="checkbox"/> Notice of Informal Patent Application |
| Paper No(s)/Mail Date <u>10/13/05</u> . | 6) <input type="checkbox"/> Other: _____ |

DETAILED ACTION

1. The following is a first office action upon examination of application number 10/553,186. Claims 1-4 are pending and have been examined on the merits discussed below.

Information Disclosure Statement

2. The information disclosure statement (IDS) submitted on 10/13/05 has been considered by the examiner.

Claim Rejections - 35 USC § 102

3. The following is a quotation of the appropriate paragraphs of 35 U.S.C. 102 that form the basis for the rejections under this section made in this Office action:

A person shall be entitled to a patent unless –

(b) the invention was patented or described in a printed publication in this or a foreign country or in public use or on sale in this country, more than one year prior to the date of application for patent in the United States.

4. Claims 1-4 rejected under 35 U.S.C. 102(b) as being anticipated by Melchione et al, US 5,966,695.

As per claim 1, Melchione et al teaches customer planning information input means for inputting a plurality of types of customer planning information (column 10, lines 20-33 customer data is entered into a central database); customer planning information storage means for storing the customer planning information inputted by the customer planning information input means (column 10, lines 20-33 customer data is entered and stored in a central database); and customer scheduling means for creating a customer schedule by selecting, among the customer planning information stored in the customer planning information storage means, a predetermined type of

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customer planning information on a predetermined date (column 32, lines 24-32 – calendar function where interaction with customer is scheduled).

As per claim 2, Melchione et al teaches the predetermined type of customer planning information includes at least information about a visit from a customer to a place of business (column 40-46, column 32, lines 4-14 – stores customer interaction with a business - i.e., customer checking accounts that where inherently opened during a visit from a customer to the bank).

As per claim 3, Melchione et al teaches responsible staff member setting means for setting a responsible staff member for a customer (column 28, lines 6-12 – leads are assigned to staff); responsible staff member storage means for storing the responsible staff member for the customer set by the responsible staff member setting means (column 28, lines 6-24); and staff member personal schedule creating means for creating a personal schedule for the responsible staff member stored in the responsible staff member storage means (column 32, lines 24-32 – calendar for scheduled leads); the staff member personal schedule creating means creating the personal schedule for the responsible staff member by automatically incorporating the customer schedule created by the customer scheduling means (column 32, lines 24-32 – calendar for scheduled leads).

As per claim 4, Melchione et al teaches history input means for inputting at least a history of interviews with a customer (column 33, lines 53-57 – tracks activity with customers); customer history storage means for storing the history inputted by the history input means (column 33, lines 53-57 – tracks activity with customers); and follow-up staff member setting means for automatically setting a follow-up staff member who replaces a main responsible staff

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member for the customer based on the history of responding to the customer stored in the customer history storage means (column 33, line 65 – column 34, line 5 – follow up scheduling).

Conclusion

5. The prior art made of record and not relied upon is considered pertinent to applicant's disclosure.

Babayev et al, US 5615121 - system and method for scheduling service providers to perform customer service requests

Schiff et al, US 6477533 – system and methods of maintaining client relationships

Gusick et al, US20010047270 – customer service system and method

Tracey et al, US 20030083917 - method of managing workflow information

Any inquiry concerning this communication or earlier communications from the examiner should be directed to JOHNNA R. LOFTIS whose telephone number is (571)272-6736. The examiner can normally be reached on M-F 8am-4:30pm.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Brad Bayat can be reached on 571-272-6636. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

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Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Johnna R Loftis/
Examiner, Art Unit 3624